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ABSTRACT

Supporting performance objectives 21, 25, and 26 of the V-TECS (Vocational-Technical Education Consortium of States) Secretarial Catalog, both a set of student materials and an instructor's manual on the basic rules of filing alphabetically are included in this packet. (The packet is the first in a set of nine on maintaining files and a library--CE 016 940-947.) The student materials include definitions of filing terms, basic rules on alphabetic filing and cross-referencing, four student self-check quizzes (with answer keys), a practice filing activity, a check-out activity, masters of simulated file cards, and an instructor's final checklist. The instructor's manual includes statement of purpose for the entire set, program description, a list of required materials and equipment for the packet, suggestions for bulletin boards, and reference materials on filing. Also included are directions for preparing the module for student use and an answer key for the check-out activity. The materials are designed for self-paced individual instruction and may be adapted for use with large groups. (A separate booklet--CE 016 911--lists contents for the nine packets in this set along with those in several other sets--seventy-eight packets in all--based on the same V-TECS catalog.) (JT)

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FILING ALPHABETICALLY

BASIC RULES

STUDENT'S MANUAL

Materials in this Lesson
have been

Modified by
Sadie McLeod

from
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FILING ALPHABETICALLY – BASIC RULES

INTRODUCTION

Filing involves the arranging of materials and records in a systematic order for preservation and reference. Always use a system that would aid in the easy retrieval of the materials filed.

Filing does not only apply to businesses but to individuals as well. Some records you might file at home would be: canceled checks, insurance policies, birth certificates, legal documents, contributions, receipted bills, etc. There may be other items that are needed for income tax purposes. A good filing system is important because some records are invaluable to a business as well as an individual.

DIRECTIONS

READ the objective below. Then complete the learning activities in order to be able to do the tasks given later. Complete the Learning Activities in the order given.

Criterion-Referenced Measure: Your instructor will provide you with a card file box and 35 documents to be filed alphabetically. Some may have to be cross-referenced.

OBJECTIVE

(1) Given 35 cards for filing, index and file alphabetically. Determine the proper arrangement with no more then 3 cards misfiled.

(2) Given 5 cards (included in the above 35) which should be cross-referenced, prepare cross-referenced cards. Four of the five cards must be cross-referenced accurately.

LEARNING ACTIVITIES

STUDY	1.	STUDY Instruction Sheet I – FILING TERMS.
CHECK	2.	CHECK YOUR KNOWLEDGE of filing terms by completing Student Self-Check I–A – FILING TERMS AND RULES and Self-Check I–B.
STUDY	3.	STUDY Instruction Sheet II – BASIC ALPHABETIC FILING RULES, SECTION A.
CHECK	4.	CHECK YOUR KNOWLEDGE of Filing Rules by completing Student Self-Check II – FILING TERMS.
STUDY	5.	STUDY Instruction Sheet III – BASIC ALPHABETIC FILING RULES, SECTION B.
CHECK	6.	CHECK YOUR KNOWLEDGE of Filing Rules by completing Student Self-Check III – BASIC ALPHABETIC FILING RULES, SECTION B.
STUDY	7.	STUDY Instruction Sheet IV – CROSS REFERENCE.
CHECK	8.	CHECK YOUR KNOWLEDGE of Cross Reference by completing Student Self-Check IV.
STUDY	9	STUDY Instruction Sheet V – PRACTICE FILING USING BASIC ALPHABETIC RULES.
CHECK	10.	ARRANGE with your instructor to complete this module by performing the final Check-Out Activities.

Instruction Sheet I

FILING TERMS

In order to arrange documents in the proper order, you must understand the filing terms used.

1. "Indexing" refers to the first step in the filing procedure. It is the process of arranging the documents in correct order for filing. For example: the name George Ross would be filed under "R" for Ross instead of "G" for George, using the last name first.

2. "Indexing Unit" refers to each part of a name. You may have two indexing units, or three units and maybe four units in some names. For example: the name George Ross has two units, Ross is the first unit, George is the second unit. Another example: the name George E. Ross has three units, Ross is the first unit, George is the second unit and E. is the third unit. The order in which an individual's name is indexed: (a) surname, or last name, first unit; (b) first name or initial, second unit; (c) middle name or initial, third unit.

   Note: Smith precedes Smithe because the "h" in Smith is not followed by another letter. This rule is referred to as " nothing precedes something."

   EXAMPLES:

Name	Unit 1	Unit 2	Unit 3
Larry R. Anders	Anders	Larry	R.
A. B. Baughman	Baughman	A.	B.
Geo. T. Smith	Smith	George	T.

3. "Alphabetizing" refers to putting documents in order by using the alphabetic sequence. For example: Anders comes before Buaghman, and Baughman comes before Smith. When names begin with the same letter, look at the second letter; if they are the same, then look at the third letter, etc. For example: Hall comes before Hill.

4. "Natural Order" is the order in which a name normally appears.

5. "Coding" is the process of marking the indexing units in a name to indicate the order in which the units should be considered for filing.

6. "Personal Name" refers to the legal name of a person. It may be part of a business name.

7. "Full Name" refers to the surname and at least one given name or initial.

8. "Surname" refers to the last name of a person.

9. "Given Name" refers to the first name of a person and his middle name or initial.

10. "Business Name" refers to the name of a firm or company, an organization, a corporation, etc.

Student Self-Check I

Exercise I-A – Filing Terms & Rules

Instructions:

Complete each sentence by writing the correct word(s) on a separate sheet of paper beside the correct number. Check your answers by page 43 when you have completed the exercise.

1. _____ means turning a name around so that the last name comes first.
2. _____ means the process of marking index units in a name to indicate the order in which they will be considered for filing.
3. _____ refers to the legal name of a person.
4. _____ refers to putting documents in order by using the alphabetic sequence.
5. _____ means that if two names are almost the same except one is shorter than the other, the shorter name or initial will come first.
6. _____ refers to the order in which a name normally appears.
7. _____ means the surname with at least one given name or initial.
8. _____ refers to a part of the name.
9. _____ is the last name of a person.
10. _____ is the first name of a person and his middle name or initial.

Student Self-Check I

Exercise I-B – Filing Terms

INSTRUCTIONS:

On a separate sheet of paper, code and index into units the names given using the format below as a guide. When you have finished, check page 43 for correct indexing. The first name is given as an example. Do not write on this sheet.

NAME	UNIT 1	UNIT 2	UNIT 3
Flora B. Albert	Albert	Flora	B.
Roland F. Anderson			
Bobby Boswell			
Martha Ann Copeland			
Alfred C. Cruz			
Frank E. Foster			
Harriett G. Gilman			
Anne Johnston			
John F. Leonard			
Charles T. Mann			
Robert S. Wilson			
Betty S. Zane			

Instruction Sheet II

BASIC ALPHABETIC FILING RULES
SECTION A

It is necessary for every business to have an established filing system. It is, therefore, necessary for the efficient secretary to know the basic methods of filing and to learn the correct filing rules. Almost every business will have at least one set of files by alphabetic arrangement; therefore, it is important that you learn the alphabetic filing rules. The following rules relate to the correct "indexing" of individual names. The examples are shown in alphabetic order.

1. Individual Names:

   (a) Index by surname (last name), given name (first name or initial), middle name or initial.
   (b) Alphabetize by first "unit" (surname).
   (c) If first "unit" is the same, go to second "unit", etc.

EXAMPLES:

Name	Unit 1	Unit 2	Unit 3
Frances Brown	Brown	Frances	
Francis Brown	Brown	Francis	
Frank E. Christain	Christain	Frank	E.
Frank R. Cistern	Cistern	Frank	R.
J. B. Davis	Davis	J.	B.

2. Surname Prefixes and Compound Names.

   Consider as part of the surname prefixes such as: De, D', Da, La, Le, Mac, Mc, Van, Von, der, etc., as one "unit."

EXAMPLES:

Name	Unit 1	Unit 2	Unit 3
Francis Doyle	Doyle	Francis	
Sam A. LeMann	LeMann	Sam	A.
Linda Ann MacPherson	MacPherson	Linda	Ann
Edward McClimon	McClimon	Edward	

Index a compound surname as two separate units. The word St. in a surname is spelled out and considered as the first indexing unit. Example: St. John would be written as Saint John (two units).

EXAMPLES: (Compound surnames)

Name	Unit 1	Unit 2	Unit 3
George St. John	Saint	John	George
Robert J. Smith	Smith	Robert	J.
Janice Smythe-Kent	Smythe	Kent	Janice

INSTRUCTION SHEET II (Section A, con't.)

3. Initials

(a) Each initial is considered a separate "indexing unit."
(b) Each initial precedes a name spelled out in full which begins with the same letter. Nothing comes before something.

EXAMPLES: (Initials)

Name	Unit 1	Unit 2	Unit 3
L. Davis	Davis	L.	
L. A. Davis	Davis	L.	A.
Leroy Davison	Davison	Leroy	

4. Business Names

Index business names in their natural order; unless the name of an individual appears in the business name–then transpose the name with the surname as the first indexing unit.

EXAMPLES:

Name	Unit 1	Unit 2	Unit 3	Unit 4
Aster Plywood Company	Aster	Plywood	Company	
Tom Aster Company	Aster	Tom	Company	
Beverly's Candy Co.	Beverly's	Candy	Company	
J. M. Danner Co.	Danner	J.	M.	Company

Student Self-Check II

BASIC ALPHABETIC FILING RULES
SECTION A

On the basis of the rules you have learned, index the following names and indicate the correct alphabetic order of the names in each group. Do not write on this sheet. Write your answers on a separate sheet using the format below as a guide. The first one is done as an example. When you have finished, verify your answers by page 44.

NAME	Alphabetical Order	UNIT 1	UNIT 2	UNIT 3
1.				
Steven A. Harrison	2	Harrison	Steven	A.
Samuel L. Hard				
Betty Ann Haskell				
Steven P. Harrison				
2.				
Anna DeBerry				
James S. DeBoard				
Richard A. DeAngelis				
Paul L. Debbane				
3.				
Robert R. Young				
Young				
Alan Young				
Allan Young				
4.				
Tom Schwartz Pizzeria				
Holiday Cleaners				
Capital City Linen Supply				
Tom Schwartz Restaurant				

Instruction Sheet III

BASIC ALPHABETIC FILING RULES
Section B

Items to be filed may not always be spelled out. It will be necessary for you to be able to handle these as well as other situations. The following rule will help you decide how to index abbreviations, articles, conjunctions, possessives and other items.

1. Common Abbreviations – Consider each as being spelled in full.

COMMON ABBREVIATIONS INCLUDE:

Agcy. or agy.–agency
Bro. or Bros.–Brother or Brothers
Chas.–Charles
Co.–Company
Corp.–Corporation
Ft.–Fort
Inc.–Incorporated
Jas.–James
Inst.–Institute
Ltd.–Limited
Mfg.–Manufacturing
Mfrs.–Manufacturers
Mt.–Mount or mountain
R. R.–Railroad
Thos.–Thomas
St. John–Saint John
Nance St.–Nance Street

EXAMPLES.

Name	Unit 1	Unit 2	Unit 3	Unit 4
ABC Company	A	B	C	Company
Wm. Burns	Burns	William		
St. John's Church	Saint	John's	Church	

2. When personal or firm names are identical, consider city, state, street, street number to determine alphabetic filing order. (Addresses are not considered as indexing units but identifying elements.)

EXAMPLES:

Name	Unit 1	Unit 2	Unit 3	Unit 4
Smith & Co. 324 Main St. Newberry, SC	Smith (&)	Company		324 Main St. Newberry, SC
Smith & Co. 520 Main St. Newberry, SC	Smith (&)	Company		520 Main St. Newberry, SC
B. C. Wood Co. 201 Woodland Way Columbia, SC	Wood	B.	C.	Company 201 Woodland Street Columbia, SC
B. C. Wood Company 3321 State Street Spartanburg, SC	Wood	B.	C.	Company 3321 State Street Spartanburg, SC

INSTRUCTION SHEET III (Section B) (con't)

3. Minor words such as articles, conjunctions and prepositions are not considered "indexing units." If the word is not considered a part of the name, put the word in parenthesis and disregard it. If the word "The" is considered a part of the name, it would be considered as an indexing unit.

EXAMPLES:

Name	Unit 1	Unit 2	Unit 3
Bates and Company	Bates (and)	Company	
The Batter Company	Batter	Company (The)	
The Club	The	Club	

4. Possessives

Consider spelling of the word up to the apostrophe in filing. When "apostrophe s" is added to a name to form a possessive, the "apostrophe s" ('s) is not considered. If the ending of the word is "s apostrophe (s'), the "s" is considered as a part of the word.

EXAMPLES:

Name	Unit 1	Unit 2	Unit 3
Mac's Typing Service	Mac'(s)	Typing	Service
Smiths' Beauty Shop	Smiths'	Beauty	Shop

5. Married Women

The legal name of a married woman should be used for indexing. For example: husband's surname "first unit", her first name (not husband's first name) as "second unit", and middle or maiden name as "third unit." Mrs. is put in parenthesis and placed at the end of the name. The husband's name is enclosed in parenthesis and put below the legal name. (Use a cross reference card for married women.)

EXAMPLES:

Name	Unit 1	Unit 2	Unit 3
Mrs. Jerry Brown (Mabel S.)	Brown (Jerry)	Mabel	S. (Mrs.)
Mrs. John Chappell (Linda C.)	Chappell (John)	Linda	C. (Mrs.)
Mrs. Pat Conley	Conley	Pat (Mrs.)	

INSTRUCTION SHEET III (Section B) (con't)

6. Numbers in Names

A number that is used in a business name is spelled out and considered as one indexing unit, regardless of the number of digits involved.

EXAMPLES:

Name	Unit 1	Unit 2	Unit 3
99 Club	Ninety-Nine	Club	
12th Street Apts.	Twelfth	Street	Apartments
24 Hour Cleaners	Twenty-four	Hour	Cleaners

Student Self-Check III

BASIC ALPHABETIC FILING RULES
SECTION B

On the basis of the rules you have learned, index the following names and indicate, by groups, the correct alphabetic order of the names. Do not write on this sheet. Write your answers on a separate sheet using the format below as a guide. The first one has been indexed to get you started. When you have finished, verify your answers by page 45.

NAME	Alphabetic ORDER	UNIT 1	UNIT 2	UNIT 3
1.				
Ft. Henry Hospital	1	Fort	Henry	Hospital
Chas. Toadvine				
Pike St. Bakery				
RMK Co. Inc.				
2.				
Butler Bee Hive 198 Crescent Road Danville, Kentucky				
Butler Bee Hive 2911 Certre Pike Danville, Kentucky				
K Mart 41 Newton Pike Lexington, Kentucky				
K Mart 1490 Dixie Hwy. Edgewood, Kentucky				
3.				
Gerald K. Johnson				
Johnson Party Boat				
Jack the Electrician				
Jackson and Son Frame Shop				
4.				
Williams' Shoe Store				
Kenneth R. Williams				

Student Self-Check III (cont'd.)

NAME	Alphabetic ORDER	UNIT 1	UNIT 2	UNIT 3
4. (cont'd.)				
Will's Motor Sales	_____	_____	_____	_____
A. J. William and Co.	_____	_____	_____	_____
5.				
Mrs. Bruce Ferguson (Mary Ann)	_____	_____	_____	_____
Mrs. Gary House (Louise)	_____	_____	_____	_____
Mrs. James Anneken (Janet)	_____	_____	_____	_____
6.				
1775 Antique Shop	_____	_____	_____	_____
Restaurant of 4 Seas	_____	_____	_____	_____
59th St. Shop	_____	_____	_____	_____
Boutique on 2nd Ave.	_____	_____	_____	_____

Instruction Sheet IV

CROSS REFERENCE

To file records and documents so that they can be easily retrieved, it is sometimes necessary to use cross referencing. (Use the capital X to indicate a cross reference.) When you are in doubt about a name, cross reference it and you will insure its retrieval.

1. A cross-reference is necessary for a married woman if her husband's name is known or can be determined.

   EXAMPLE:

Name	Unit 1	Unit 2
Mrs. Jonathon (Lynda) Brown	Brown	Lynda (Mrs.)
	XBrown	Jonathon (Mrs.)
	[See Brown, Lynda, (Mrs.)]	

2. When a business has combined surnames, a cross reference should be made.

   Example: Jones, Smith & Miller

Unit 1	Unit 2	Unit 3
Jones	Smith (&)	Miller
XSmith	Jones (&)	Miller
(See Jones, Smith & Miller)		
XMiller,	Jones (&)	Smith
(see Jones, Smith & Miller)		

3. When a person has an unusual name, it should be cross referenced even though the last name is considered the surname.

   Example:

Name	Unit 1	Unit 2
Sing Wong	Wong	Sing
	X Sing	Wong
	(See Wong, Sing)	

4. Names that have the same pronunciation but are spelled differently should be cross referenced.

   Example:

   Smith, See also Smyth, Smythe
   Smyth, See also Smith, Smythe
   Smythe, See also Smith, Smyth

5. Organizations that are better known by initials than by names should be cross referenced.

   Example:
   Future Business Leaders of America
   X FBLA (See Future Business Leaders of America)

Student Self-Check IV

CROSS REFERENCE

On the basis of the information on cross referencing, index the following names and make a cross reference where necessary. Do not write on this sheet. Write your answers on a separate sheet using the format below as a guide. The first one is done for you as an example. When you have finished, check your answers by page 46.

NAME	UNIT 1	UNIT 2	UNIT 3
Mrs. Harold D. McQueen (Teresa Lynn)			
Regular File:	McQueen (Harold D.)	Teresa	Lynn (Mrs.)
Cross Reference:	McQueen	Harold	D. (Mrs.)
	SEE: McQueen, Teresa Lynn (Mrs.)		
NAME Mrs. Virginia Miller			
Regular File:			
Cross Reference:			
NAME P. T. A.			
Regular File:			
Cross Reference:			
NAME R and H Builders			
Regular File:			
Cross Reference:			
NAME Fred R. Louis			
Regular File:			
Cross Reference:			
NAME Frank C. Lewis			
Regular File:			
Cross Reference:			

Instruction Sheet V

PRACTICE FILING USING BASIC ALPHABETIC RULES

Index and alphabetize the names on the Practice Filing Sheet. Cut the paper on the dotted line so you can put the cards in the correct order. Where necessary prepare a cross-reference on the blank cards that are provided by your instructor. When you have the cards in the correct order, place the number of the card and the name given on the card on the Practice Answer Sheet. If card P-2 needs a cross-reference, assign the number P-2X to the cross reference card. Card P-5's cross reference would be P-5X, etc. Numbers 1 and 2 have been completed to get you started. When you have finished check your answers by page 47.

Answer Sheet

(For Instruction Sheet V)

Card No.	Name	Card No.	Name

1 2 3 (Units)
Martin, Dan M. (Correct indexing)

Dan M. Martin

Cut on broken lines to make index cards.

Index name on solid line above typed name.

The first two cards are given as examples.

1 2 3
Newberry Drug Company

Newberry Drug Company

P-1

George M. Carroll

Practice for Instruction Sheet 5.

P-2

G. Gerrald

P-3

John P. Gerrald

P-4

Gloria DeVan

P-5

John Murphy Co.

P-6

A and J Frame Shop

P-7

Jas. S. Snow Agy.

P-8

Henry's Shoe Store

P-9

Elsmere Drugs

P-10

Palm Beach Co.
129 Main St.
Newport, KY

P-11

Palm Beach Co.
19 Denton Lane
Edgewood, KY

P-12

Brenda the Beautician

P-13

Village Cinema

P-14

9th St. Bootery

P-15

R. L. Polk Co.

P-16

Inst. of the Blind

P-17

2180 St. Shop

P-18

Adam's Restaurant

P-19

F.H.A.

P-20

Mrs. Jane Russell

P-21

Ft. Mitchell Garage

P-22

George P. Patton

P-23

Mrs. Mary Sue Ball

P-24

Mrs. Anna Burns

P-25

Anita K. Smythe

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. Complete each activity and submit your work to your instructor who will evaluate it using the Instructor's Final Checklist, BASIC ALPHABETIC FILING.

OPTIONAL: Your Instructor may also elect to give you a timed retrieval test on these cards, after your work has been evaluated.

Index and alphabetize the names on Final Check-Out Sheet. Cut the paper on the broken line so you can put the cards in the correct order. When you have the cards in the correct order, place the card number and name on the Answer Sheet in the proper sequence. You must also prepare cross-reference cards whenever they are necessary.

Place these cards in a safe place so you can use them with your Final Checkout of Module IV B.

ANSWER SHEET

FINAL CHECKOUT

Card No.	Name	Card No.	Name

A-1

Sally R. Crow

FINAL CHECK-OUT

Cut cards on broken lines.

Index name on solid line above typed name.

A-2

Standard Fire Insurance Co.

A-3

Jas. E. Singer

A-4

Mrs. William S. Rowe
(Bobbie Jean)

A-5

Charles McDonald

A-6

J. C. Penny and Co.

A-7

Fred's Frame Shop

A-8

Fred R. Fischer

A-9

129 Budget Basement

A-10

N and K Development Co.

A-11

J. P. Gregory

A-12

K and H Tire Co.

A-13

Shirley R. LeVan

A-14

Ken's Auto Repair

A-15

Ky. Termite Control

A-16

1 Hour Cleaners

A-17

Mrs. Donald H. Maxwell

A-18

Rolland Mfg. Co.

A-19

Top of the Hill Club

A-20

Carl R. Taylor

A-21

John Trusty

A-22

Paulson's and Son Paint Co.

A-23

Williams' Insurance Agcy.

A-24

Chester Horton

A-25

Walter C. Doll

A-26

F. B. L. A.

A-27

Mrs. Gerald Fromley
(Betty)

A-28

Chester Bryan

A-29

F. B. I.

A-30

George K. Smyth

A-31

Mrs. Christine Roberts
(William L.)

A-32

Fred R. Norman and Sons

A-33

Lawrence Davis

A-34

Newberry Drug Company

A-35

J. A. Davis Company

Instructor's Final Checklist

FILING ALPHABETICALLY – BASIC RULES

Check the student's performance in the following elements of filing alphabetically–basic rules.

Place an x in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an x in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished, or Partially Accomplished, the student and instructor will discuss this and decide which learning activities must be repeated.

	STUDENT PERFORMANCE			
	Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
1. The student indexed names correctly in preparing for filing	[ ]	[ ]	[ ]	[ ]
2. The student alphabetized names correctly in filing	[ ]	[ ]	[ ]	[ ]
3. The student prepared cross reference sheets where necessary	[ ]	[ ]	[ ]	[ ]
4. The student correctly evaluated his/her own work after each self check	[ ]	[ ]	[ ]	[ ]

ANSWERS

(Exercise I-A)

Student Self-Check I

1. Indexing
2. Coding
3. Personal Name
4. Alphabetizing
5. Nothing before something
6. Natural Order
7. Full Name
8. Unit
9. Surname
10. Given Name

(Exercise I-B)

UNIT 1	UNIT 2	UNIT 3
Albert	Flora	B.
Anderson	Roland	F.
Boswell	Bobby	
Copeland	Martha	Ann
Cruz	Alfred	C.
Foster	Frank	E.
Gilman	Harriett	G.
Johnston	Anne	
Leonard	John	F.
Mann	Charles	T.
Wilson	Robert	S.
Zane	Betty	S.

ANSWERS

Student Self-Check II

BASIC ALPHABETIC FILING RULES
SECTION A

	Alphabetic Order	UNIT 1	UNIT 2	UNIT 3	UNIT 4
1.	2	Harrison	Steven	A.	
	1	Hard	Samuel	L.	
	4	Haskell	Betty	Ann	
	3	Harrison	Steven	P.	
2.	3	DeBerry	Anna		
	4	DeBoard	James	S.	
	1	DeAngelis	Richard	A.	
	2	Debbane	Paul	L.	
3.	4	Young	Robert	R.	
	1	Young			
	2	Young	Alan		
	3	Young	Allan		
4.	3	Schwartz	Tom	Pizzeria	
	2	Holiday	Cleaners		
	1	Capital	City	Linen	Supply
	4	Schwartz	Tom	Restaurant	

ANSWERS

Student Self-Check III

BASIC ALPHABETIC FILING
Section B

		1	2	3	4	5
1.	1	Fort	Henry	Hospital		
	4	Toadvine	Charles			
	2	Pike	Street	Bakery		
	3	R	M	K	Company	Incorporated

		1	2	3	4	5	6	7	
2.	2	Butler	Bee	Hive	Danville	Kentucky	Crescent	Road	198
		1	2	3	4	5	6	7	
	1	Butler	Bee	Hive	Danville	Kentucky	Certre	Pike	2911
		1	2	3	4	5	6		
	4	K	Mart	Lexington	Kentucky	Newton	Pike	41	
		1	2	3	4	5	6		
	3	K	Mart	Edgewood	Kentucky	Dixie	Highway	1490	

		1	2	3	4
3.	3	Johnson	Gerald	K.	
	4	Johnson	Party	Boat	
	1	Jack (the)	Electrician		
	2	Jackson (and)	Son	Frame	Shop

		1	2	3	4
4.	4	Williams'	Shoe	Store	
	3	Williams	Kenneth	R.	
	1	Will('s)	Motor	Sales	
	2	William	A.	J. (and)	Company

		1	2	3
5.	2	Ferguson (Bruce)	Mary	Ann (Mrs.)
	3	House (Gary)	Louise (Mrs.)	
	1	Anneken (James)	Janet (Mrs.)	

		1	2	3
6.	4	Seventeen hundred Seventy-five	Antique	Shop
	3	Restaurant (of)	Four	Seas
	2	Fifty-ninth	Street	Shop
	1	Boutique (on)	Second	Avenue

ANSWERS

Student Self-Check IV

CROSS REFERENCE

		UNIT 1	UNIT 2	UNIT 3
1.	Regular File:	McQueen (Harold D.)	Teresa	Lynn(Mrs.)
	Cross Reference:	McQueen	Harold	D. (Mrs.)
		SEE: McQueen, Teresa Lynn		
2.	Regular File:	Miller	Virginia (Mrs.)	
	Cross Reference:	NONE		
3.	Regular File:	Parent	Teachers'	Association
	Cross Reference:	P.	T.	A.
		SEE: Parent Teachers' Association		
4.	Regular File:	R (and)	H.	Builders
	Cross Reference:	NONE		
5.	Regular File:	Louis	Fred	R.
	Cross Reference:	Lewis	Fred	R.
		SEE: Louis, Fred R.		
6.	Regular File:	Lewis,	Frank	C.
	Cross Reference:	Louis,	Frank	C.
		SEE: Lewis, Frank C.		

ANSWERS

(Instruction Sheet V)

CORRECT ORDER OF CARDS

1. P-6 A (and) J Frame Shop
2. P-18 Adam('s) Restaurant
3. P-23 Ball, Mary Sue (Mrs.)
4. P-12 Brenda (the) Beautician
5. P-24 Burns, Anna (Mrs.)
6. P-1 Carroll, George M.
7. P-4 DeVan, Gloria
8. P-9 Elsmere Drugs
9. P-19X F.H.A.
   [See Future Homemakers (of) America]
10. P-21 Fort Mitchell Garage
11. P-19 Future Homemakers (of) America
12. P-2 Gerrald, G.
13. P-3 Gerrald, John P.
14. P-8 Henry('s) Shoe Store
15. P-16 Institute (of the) Blind
16. P-5 Murphy, John Company
17. P-14 Ninth Street Bootery
18. P-11 Palm Beach Company
    Edgewood, Kentucky
    Denton Lane 19
19. P-10 Palm Beach Company
    Newport, Kentucky
    Main Street 129
20. P-22 Patton, George P.
21. P-15 Polk, R. L. Company
22. P-20 Russell, Jane (Mrs.)
23. P-25X Smith, Anita K.
    (See Smythe, Anita K.)
24. P-25 Smythe, Anita K.
25. P-7 Snow, James S. Agency
26. P-17 Twenty-one Hundred
    Eighty Street Shop
27. P-13 Village Cinema

FILING ALPHABETICALLY

BASIC RULES

INSTRUCTOR'S MANUAL

Materials in this Lesson
have been

Modified by
Sadie McLeod

from
Materials Developed and Graciously Provided by
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and
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College of Education, University of Kentucky

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PURPOSE OF THE PROGRAM

Files are vital to the success of a business because they provide a history of the company's transactions with its customers. If a firm anticipates continued business with these customers, an effective filing system is essential.

Office occupations students need to possess an understanding of the importance of files in the operation of a business, procedures for organizing a filing system and the function of files in supporting business operations.

The most attractive or expensive filing cabinets are not worth very much to a business if the records inside them cannot be retrieved quickly and easily when needed. "Instant findability" is the main criterion for evaluating a filing system.

DESCRIPTION OF THE PROGRAM

These materials in filing have been designed to provide the student with a basic understanding of placing records in an orderly arrangement for the purpose of easy recall at a future time. Filing refers to the orderly storage and subsequent retrieval of records, books, hardware, clothing, etc. Filing is a concept any student can apply to his/her own personal possessions.

The materials are organized so the student may work on an individualized basis with teacher supervision.

REQUIRED MATERIALS AND EQUIPMENT

The following is a list of materials and equipment needed to teach this unit on filing:

Typewriters

Papercutter

Index cards 3" x 5" (76.2 x 127 mm) (optional)

Manila file folders

Primary guides

Secondary guides

Index card file box

File drawer (size of folders)

(a box can be used for letter folders to give the effect of a filing cabinet drawer. You may have a filing cabinet which could be used for this purpose.)

BULLETIN BOARD

Motivate your classes by using well-arranged bulletin boards on filing. You should change the board frequently for it to be effective. You may use one bulletin board for magazine or newspaper articles the students may find related to filing. Another bulletin board may be used to display the various types of filing equipment. The board may be changed to show the different methods of filing.

FILING REFERENCE MATERIALS

The following books are valuable aids in the teaching of filing:

Alphabetic Indexing, Mearl R. Guthrie (South-Western Publishing Co., Third Edition)

Business Filing and Records Control, Bassett-Goodman (South-Western Publishing Co., Fourth Edition)

Clerical Office Procedures, Meehan-Pasewark-Oliverio (South-Western Publishing Co., Fifth Edition)

Filing Personal Names, Duchan/Schulthesis (South-Western Publishing Co.)

Progressive Filing, Kahn, Yerian, Stewart (Gregg Division, McGraw-Hill Book Co.)

General Office Procedures, Archer, Brecker, Stewart (Gregg Division, McGraw-Hill Book Co.)

Catalogs of filing supplies and equipment

Magazine articles on filing

NOTES TO TEACHER

These modules on filing, IV A-I, are designed for either small group or individualized instruction and should be completed in sequence. In some instances, the student is referred to a previous module to retrieve letters or cards from folders or card files. The instructor should review all the filing modules thoroughly before beginning the unit on filing. You will note that there are forms to duplicate in each module. Answer keys are provided for the Check-Out Activities where appropriate.

To prepare this module on the Basic Rules of Alphabetic Filing for student use, you should duplicate the following perishable items located in the student manual:

1. Answer Sheets for Self-Check V, p. 17
   Final Check-Out, p. 29
2. Practice Filing Cards, pp. 18-27
3. Blank Cards (for cross referencing), p. 27
4. Final Checkout Cards, pp. 30-41
5. Instructor's Final Checklist, p. 42

You will also need to provide scissors or papercutter and a small file box for the cards. A key for the final checkout is provided in your manual.

FINAL CHECK-OUT

Card No.	Name	Card No.	Name
A-28	Bryan, Chester	A-22	Paulson's (&) Son Paint Company
A-1	Crow, Sally R.	A-6	Penny, J.C. (&) Company
A-35	Davis, J.A. Company	A-31	Roberts, Christine (Mrs.)
A-33	Davis, Lawrence	A-31-X	Roberts, William L. (Mrs.)
A-25	Doll, Walter C.	A-18	Rolland Manufacturing Company
A-29	F.B.I.	A-4	Rowe, Bobbie Jean (Mrs.)
A-26	F.B.L.A.	A-4-X	Rowe, William S. (Mrs.)
A-29-X	Federal Bureau (of) Investigation	A-3	Singer, James E.
A-8	Fischer, Fred R.	A-30-X A-30	Smith, George K. (See Smyth) Smyth, George K.
A-7	Fred('s) Frame Shop	A-2	Standard Fire Insurance Company
A-27	Fromly, Betty (Mrs.)	A-20	Taylor, Carl R.
A-27-X	Fromly, Gerald (Mrs.)	A-19	Top (of the) Hill Club
A-26-X	Future Business Leaders (of) America	A-21	Trusty, John
A-11	Gregory, J.P.	A-23	Williams' Insurance Agency
A-24	Horton, Chester		
A-12	K (and) H Tire Company		
A-14	Ken('s) Auto Repair		
A-15	Kentucky Termite Control		
A-13	LeVan, Shirley R.		
A-17	Maxwell, Donald H. (Mrs.)		
A-5	McDonald, Charles		
A-10	N (and) K Development Company		
A-34	Newberry Drug Company		
A-32	Norman, Fred R. & Sons		
A-16	One Hour Cleaners		
A-9	One Hundred Twenty-Nine Budget Basement		